USDA Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network
Template Version 2.09

Required Report - public distribution

Date: 6/10/2005

GAIN Report Number: E35118

EU-25

Oilseeds and Products

Annual

2005

Approved by:
Norval E. Francis, Jr.
U.S. Mission to the EU

Prepared by:
Karin Bendz

Report Highlights:
The record harvest of 15 million MT of rapeseed in MY 2004/05 was a boost for biodiesel production in the EU. For MY 2005/06 harvests are expected to be high but not as high as last year.

Soybean utilization is expected to remain stable. Because of low crush margins, high crush prices compared to South America and a bad market for the oil, importers are turning to direct meal imports.

Palm oil imports are expected to increase sharply over the coming years. A low price caused by tax exemptions on raw palm oil for Malaysian companies in the EU makes palm oil very competitive on the European market.

Includes PSD Changes: Yes
Includes Trade Matrix: No
Unscheduled Report
Brussels USEU [BE2]
[E3]

This report was only possible through the assistance, input and knowledge of:

Petra Choteborska from FAS Prague
Bob Flach from FAS The Hague
Bill George from FAS Washington
Marie-Cecile Henard from FAS Paris
Steve Knight from FAS London
Roswitha Krautgartner from FAS Vienna
Hasse Kristensen from FAS Copenhagen
Asa Lexmon from FAS Stockholm
Sabine Lieberz from FAS Berlin
Jana Mikulasova from FAS Slovakia
Wlodek Makowski FAS Warsaw
Andreja Misir, from FAS Zagreb
Ferenc Nemes from FAS Budapest
Sandro Perini from FAS Rome
Leonor Ramos from FAS Lisbon
Stamatis Sekliziotis from FAS Athens

Data in this report is based on FAS analysts in the EU and is not official USDA data.
HA = Hectares
MT = Metric ton
Benelux = Belgium, the Netherlands and Luxembourg
MY = Marketing Year.

The EU local marketing years used in this report are:

Oct -Sep
Soybean complex
Sunflower complex
Cottonseed complex
Peanut complex

July-June
Rapeseed complex

Nov - Oct
Olive Oil

Jan - Dec
Copra complex
Palm Kernel complex
Palm Oil
Fish Meal

Executive Summary

In the European Union rapeseed is the most important oilseed produced, followed by sunflower seed. In 2004 the production of rapeseeds was about 15,000,000 tons. Production of sunflowerseed was 4,000,000 tons and the production of soybeans was about 870,000 tons.

The overall situation in the European Union is that there was a record harvest of rapeseed in 2004, caused by favorable weather conditions. The surplus of rapeseed oil is used for production of biodiesel, and big carryover stocks are expected. Germany is the most important Member State (MS) on the biodiesel market, accounting for about 40 percent of the biodiesel production. For MY 2005/06 the production of rapeseed is expected to remain high, though not as high as the 2004 record year.

For soybeans, the EU regulations on biotech traceability and labeling (1830/2003) and on Novel Food/Novel Feed (1829/2003) that went into force in April 2004 have negatively impacted the amount of soyoil used in food. Most of these changes took place over the course of the last 5 years along with the start of the discussions. In general all food and feed products containing GMO or produced from GMO must be labeled. However, meat, milk or eggs obtained from animals fed with GM feed do not require GM labeling which is the reason why the labeling requirement did not impact the use of soymeal in feed.

The EU compound feed production is stable if not declining, mainly because the animal herd in the EU is shrinking, thus the need for feed is smaller. Also with the big grain harvest last year and the availability of feed grain and rapeseed meal, the market for soymeal is not expected to increase.

Because of low crush margins for soybeans in the EU due to bad market for soyoil, the EU increasingly imports soybean meal instead of soybeans.

Summary EU25 Oilseed Oils (000' MT)			
Year	**2003/04**	**2004/05**	**2005/06**
Production	11,462	11,681	11,629
Extra EU25 Imports	5,558	6,283	6,577
Extra EU25 Exports	1,350	1,319	1,237
Total Use	15,452	16,679	17,350

Source: FAS posts

SOYBEAN COMPLEX

EU 25 Soybeans (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	10/2003		10/2004		10/2005	
Area (1000 ha)	296	296	276	274	262	306
Beginning Stocks	930	930	740	868	892	893
Production	710	633	804	793	684	852
Extra EU25 imports	14,638	14,638	15,359	14,185	15,689	14,155
TOTAL SUPPLY	**16,278**	**16,201**	**16,903**	**15,846**	**17,265**	**15,900**
Extra EU25 exports	6	6	10	30	10	32
Crush	14,206	13,630	14,600	13,478	14,991	13,499
Food Use	108	108	109	112	110	116
Feed, Seed, Waste	1,218	1,589	1,292	1,332	1,271	1,339
TOTAL Use	15,532	15,327	16,001	14,922	16,372	14,954
Ending Stocks	740	868	892	893	883	914
TOTAL DISTRIBUTION	**16,278**	**16,201**	**16,903**	**15,846**	**17,265**	**15,900**

Source: FAS

Soybeans

In 2003/04 the imports to Benelux were decreased by about 15 percent due to low crush margins. In Germany the decrease was 10 percent. The levels are expected to remain stable, and no increase is expected because of the preference for other oils than soybean by the in the food industry. Crushers anticipate that in North West Europe about 3 MMT of soybean crushing plants will close down, or be converted to rapeseed crushing.

During 2004/2005, EU soybean imports are estimated to decline by about three percent. The main reason for this reduction is the preference for soybean meal imports above the import and domestic crush of beans. This preference is based on low crushing margins of EU crushing plants compared to plants in South America, and on the bad market for soyoil in the EU due to compulsory traceability and labeling set by EU regulations 1829/2003 and 1830/2003. Another reason for the lower imports is the limited supply of Brazilian soybeans during the second half of the season. In France the imports of soybeans from the US increased significantly during the first five months of 2004/05 due to the low availability of soybeans from South America. However, French imports from Brazil and Argentina are expected to be back at average levels at the end of 2004/05.

During MY 2005/2006, imports and crushing are expected to remain stable, as crushing margins are not expected to improve. The drought in South America is not expected to have significant impact on the European market, since a lot of the meal imports come from Argentina, which is not that affected by the drought.

EU25 Soybean meal (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	10/2003		10/2004		10/2005	
Crush	14,206	13,630	14,600	13,478	14,991	13,499
Extraction Rate	0.7871	0.7943	0.7870	0.7913	0.7835	0.7900
Beginning Stocks	870	699	850	837	857	850
Production	11,181	10,826	11,490	10,665	11,746	10,664
Extra EU25 imports	21,864	21,864	22,250	21,850	22,402	21,900
TOTAL SUPPLY	**33,915**	**33,389**	**34,590**	**33,352**	**35,005**	**33,414**
Extra EU25 exports	398	398	364	364	393	450
Industrial	10	10	10	10	10	10
Food Use	27	27	30	30	30	32
Feed, Seed, Waste	32,630	32,117	33,329	32,098	33,703	32,071
TOTAL Use	32,667	32,154	33,369	32,138	33,743	32,113
Ending Stocks	850	837	857	850	869	850
TOTAL DISTRIBUTION	**33,915**	**33,389**	**34,590**	**33,352**	**35,005**	**33,414**

Source: FAS

Soybean meal

The demand for soybean meal has not suffered from the GMO discussions. However, the increased production of rapeseed meal as a by-product from rapeseed oil production had the effect that some soybean meal is being replaced by rapeseed meal and feed use is expected to decline by 5 percent in MY 04/05.

EU soybean meal consumption is expected to stabilize during this season and next season. The factors directing towards a growth in soybean meal consumption are the projected lower use of corn gluten feed, citrus pulp and palm kernel meal. This is, however, not expected to lead to a growth in consumption due the good availability of feed grains and rapeseed meal. In addition, EU compound feed production is expected to shrink in the future, mainly because of the decreasing animal production.

EU soybean meal imports will not be significantly affected by the drought in South America, as most meal imports originate from Argentina, where the drought has reportedly been less severe than in Brazil.

EU25 Soy oil (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	10/2003		10/2004		10/2005	
Crush	14,206	13,630	14,600	13,478	14,991	13,499
Extraction Rate	0.1782	0.1841	0.1745	0.1776	0.1778	0.1776
Beginning Stocks	231	220	205	200	174	200
Production	2,531	2,509	2,548	2,394	2,665	2,398
Extra EU25 imports	43	48	41	80	41	65
TOTAL SUPPLY	**2,805**	**2,777**	**2,794**	**2,674**	**2,880**	**2,663**
Extra EU25 exports	570	536	653	509	646	529
Industrial	243	305	276	308	269	309
Food Use	1,676	1,597	1,594	1,512	1,697	1,490
Feed, Seed, Waste	111	139	97	145	97	145
TOTAL Use	2,030	2,041	1,967	1,965	2,063	1,944
Ending Stocks	205	200	174	200	171	190
TOTAL DISTRIBUTION	**2,805**	**2,777**	**2,794**	**2,674**	**2,880**	**2,663**

Source: FAS

Soybean oil

In compliance with the Traceability and Labeling legislation, it is obligatory to label oils produced from genetically modified beans and seeds as GM since April 2004. This measure has led to a lower use of soybean oil for food purposes. Most of the substitution of soybean oil, mainly by rapeseed oil, has already taken place over the course of the past five years with the start of the discussions about labeling of biotech products in the EU. However due to the low price on soybean oil compared to rapeseed oil, industry and the food service sector continue to use soybean oil.

The use of soybean oil for biodiesel production is reportedly limited. Pure soyoil diesel cannot be used because of the CEN standards. (See chapter on biofuels later in the report) France only provides tax cuts for the production of biodiesel, which standards correspond to rapeseed or sunflower seed methyl ester, while in Germany car manufacturers limit their warranties to the use of biodiesel made from rapeseed oil only because the original tests for engine compatibility had been made with this product.

RAPESEED COMPLEX

EU25 Rapeseed (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	07/2003		07/2004		07/2005	
Area (1000 ha)	4,161	4,183	4,425	4,497	5,400	4,639
Beginning Stocks	365	393	253	418	937	1,400
Production	11,097	11,177	14,651	15,278	13,667	13,710
Extra EU25 imports	184	134	115	168	115	160
TOTAL SUPPLY	11,646	11,704	15,019	15,864	14,719	15,270
Extra EU25 exports	102	119	453	412	353	282
Crush	10,558	10,456	12,662	13,070	12,546	13,250
Food Use		0		0		0
Feed, Seed, Waste	733	711	974	982	925	839
TOTAL Use	11,291	11,167	13,636	14,052	13,471	14,089
Ending Stocks	253	418	937	1,400	894	900
TOTAL DISTRIBUTION	11,646	11,704	15,019	15,864	14,719	15,270

Source: FAS

Rapeseed

After the short harvest of 2003, limited by drought, 2004 was a record crop year, with very favorable weather conditions and production of rapeseed was 15.278 MMT. In MY 2004/05, exports increased compared to 2003/04, but were limited as a result of the lack of price competitiveness with Canadian canola on world markets. Consequently stocks piled up despite increased crushing. In addition, on-farm stocks increased significantly, especially in France and in the UK, where farmers wait for higher prices to put their harvest on the market.

In MY 2004/05, crush is favored by high crush margins for rapeseed relative to margins for sunflower seeds and soybeans, and boosted by the growing demand from the biodiesel sector. In Germany the rapeseed crushing capacity is growing and some Germany plants have contracts with French and Polish farmers to buy their rapeseed, because of the big demand for biodiesel.

In MY 2005/06, rapeseed production is expected to be lower than in the record year 2004/05, despite a higher acreage, triggered by the strong demand for biodiesel. There has not been a lot of winterkill this season, but the late and cold spring could have negative effects on this year's harvest. Also, rapeseed crush is expected to remain strong, due to increased crushing capacity in the Benelux and Germany, and rapeseed crush capacities at their maximum level in France and Poland. In addition, stocks are likely to decline to more normal levels in 2005/06, due to lower production and higher crush than in the previous year.

Rapeseed Meal (1000 MT)						
	2003/04		2004/05		2005/06	
Calendar Year begin	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
	07/2003		07/2004		07/2005	
Crush	10,558	10,456	12,662	13,070	12,546	13,250
Extraction Rate	0.5900	0.5786	0.5884	0.5572	0.5852	0.5552
Beginning Stocks	127	128	108	110	121	134
Production	6,229	6,050	7,450	7,283	7,342	7,357
Extra EU25 imp.	110	110	111	105	101	100
TOTAL SUPPLY	6,466	6,288	7,669	7,498	7,564	7,591
Extra EU25 exp.	52	57	53	58	46	68
Industrial	4	0	4	0	4	0
Food Use		0		0		0
Feed, Seed, Waste	6,302	6,122	7,491	7,306	7,389	7,393
TOTAL Use	6,306	6,122	7,495	7,306	7,393	7,393
Ending Stocks	108	110	121	134	125	130
TOTAL DISTRIBUT.	6,466	6,288	7,669	7,498	7,564	7,591

Source: FAS

Rapeseed Meal

In MY 2004/05, the significant increase in rapeseed meal production, caused by the high crush for biodiesel, resulted in stronger use in animal feed. Although production and use of rapeseed meal partially replaced soy meal in some Member States (such as Germany and France), it has not been the case EU-wide. In some MS rapeseed meal is partially replacing corn gluten feed in animal feed rations.

Most of the rapeseed meal is used within the European Union in compound feed. With a raising meal production in addition to the shrinking production of compound feed caused by the shrinking animal herds, more rapeseed meal is anticipated to be available for exports.

Rapeseed Oil (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	07/2003		07/2004		07/2005	
Crush	10,558	10,456	12,662	13,070	12,546	13,250
Extraction Rate	0	0	0	0	0	0
Beginning Stocks	315	230	299	113	350	147
Production	4,200	4,369	5,010	5,266	4,955	5,369
Extra EU25 imports	29	33	9	25	9	30
TOTAL SUPPLY	4,544	4,632	5,318	5,404	5,314	5,546
Extra EU25 exports	143	138	162	155	156	140
Industrial	1,356	1,804	1,435	2,291	1,550	2,459
Food Use	2,744	2,527	3,367	2,761	3,314	2,747
Feed, Seed, Waste	2	50	4	50	4	49
TOTAL Use	4,102	4,381	4,806	5,102	4,868	5,255
Ending Stocks	299	113	350	147	290	151
TOTAL DISTRIBUTION	4,544	4,632	5,318	5,404	5,314	5,546

Source: FAS

Rapeseed Oil

A significant part of rapeseed oil is used for industrial purposes, mainly biofuels. In MY 2003/04, most of the industrial rapeseed oil was used in Germany, with 900,000 MT, and France (400,000 MT), out of a total of 1.8 million MT, according to the European Biodiesel Board.

In MY 2004/05, the industrial use of rapeseed oil increased, mainly due a 300,000 MT increase in Germany. According to Oil World, about one third of the 2004/05 EU rapeseed harvest was crushed for the production of biodiesel.

In MY 2005/06, industrial use of rapeseed oil is expected to further increase, in large part because of increased biodiesel production in Germany, where the “Green” government strongly supports biofuel development. Tax breaks have been set for blends of biodiesel mixed with mineral diesel, while such financial incentives previously existed only for 100 percent biodiesel uses. The strong increase in German biodiesel production capacity resulted in contracting between German processing plants with Polish and French rapeseed growers. In addition, some rapeseed methyl ester produced in the Czech Republic is exported to Germany.

The future of such an increase in industrial rapeseed oil use in biofuels in uncertain. One uncertainty is whether the European technical standards of biodiesel will be changed or not to incorporate soybean oil and palm oil, which are cheaper than rapeseed oil. (See chapter on biodiesel later in this report)

Another uncertainty is whether this increase in industrial use of rapeseed oil will occur at the expense of food use, mostly in the margarine industry, which is already worried about the

strong competition for the rapeseed oil. The demand from the food industry is a reflection of the companies' attempts to avoid the labeling requirements attached to the use of oil from GM soybeans. Export of rapeseed oil is not expected to increase because of the availability of cheaper vegetable oils on the world market.

SUNFLOWERSEED COMPLEX

EU25 Sunflowerseed (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	10/2003		10/2004		10/2005	
Area (1000 ha)	2,432	2,442	2,175	2,242	2,300	2,223
Beginning Stocks	437	398	352	508	325	536
Production	3,924	4,035	3,705	4,181	3,800	3,715
Extra EU25 imports	1,467	1,442	910	910	1,000	1,126
TOTAL SUPPLY	5,828	5,875	4,967	5,599	5,125	5,378
Extra EU25 exports	25	63	14	48	25	47
Crush	4,883	4,815	4,076	4,462	4,185	4,302
Food Use	138	162	139	163	140	167
Feed, Seed, Waste	430	327	413	390	425	338
TOTAL Use	5,451	5,304	4,628	5,015	4,750	4,807
Ending Stocks	352	508	325	536	350	524
TOTAL DISTRIBUTION	5,828	5,875	4,967	5,599	5,125	5,378

Source: FAS

Sunflower seed

With a marketing year starting in October, which is just after the harvest of the sunflowerseed in Europe, there would be a very high stock number, with all the new harvest in stocks. Therefore this report only reports on the stocks that is carryover from last year's crops.

The supply of sunflowerseed in the European Union is mainly a result of two factors, the domestic production and the production in the Black Sea area (Russia and Ukraine). In MY 2003/04 imports were very high because of high production in this area due to frost of winter crops.

In MY 2004/05 the supply of sunflowerseed decline as a result of reduced imports from the Black Sea area, and despite increased domestic production. Consequently, and due to low crush margins for sunflowerseed compared to rapeseed, the sunflowerseed crush decreased significantly.

For MY 2005/06 Hungary is expecting a smaller harvest than the bumper harvest in 2004/05 which was caused by favorable weather conditions. In Hungary about 20 percent of the area is planted with sunflower. Because of the need for rotation of crops this area cannot increase. France is also expecting a decline in production caused by the cold and dry weather this spring that gives problems with germination. Imports from the Black Sea area is expected to cover for some of these losses.

Consumption of sunflowerseed is low but increasing, as consumers view the seed to be healthy to eat.

EU25 Sunflower meal (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	10/2003		10/2004		10/2005	
Crush	4,883	4,815	4,076	4,462	4,185	4,302
Extraction Rate	0.5601	0.5432	0.5608	0.5446	0.5603	0.5463
Beginning Stocks	87	93	114	107	73	78
Production	2,735	2,616	2,286	2,430	2,345	2,350
Extra EU25 imports	1,907	1,922	1,805	1,722	1,750	1,844
TOTAL SUPPLY	4,729	4,631	4,205	4,260	4,168	4,273
Extra EU25 exports	20	29	21	5	15	5
Industrial		0		0		0
Food Use		0		0		0
Feed, Seed, Waste	4,595	4,495	4,111	4,177	4,075	4,197
TOTAL Use	4,595	4,495	4,111	4,177	4,075	4,197
Ending Stocks	114	107	73	78	78	71
TOTAL DISTRIBUTION	4,729	4,631	4,205	4,260	4,168	4,273

Source: FAS

Sunflower seed meal

The only use for sunflower meal in the European Union is as feed. With the lower crushing margins compared to rapeseed and the big availability of rapeseed meal caused by the biofuels sector and the decreasing compound feed production, the demand for sunflower meal is expected to decline in MY 2004/05 and to remain low in MY 2005/06. However in Hungary sunflower meal is an important protein source for animal production. Some sunflower meal could also be replacing the declining use of corn gluten feed caused by the problems with imports of GM corn not permitted in the European Union.

EU25 Sunflower Oil (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	10/2003		10/2004		10/2005	
Crush	4,883	4,815	4,076	4,462	4,185	4,302
Extraction Rate	0.3963	0.4102	0.3960	0.4101	0.3943	0.4103
Beginning Stocks	270	203	269	275	234	247
Production	1,935	1,975	1,614	1,830	1,650	1,765
Extra EU25 imports	528	562	723	740	685	764
TOTAL SUPPLY	2,733	2,740	2,606	2,845	2,569	2,776
Extra EU25 exports	130	151	122	175	115	86
Industrial	85	107	90	93	85	108
Food Use	2,249	2,194	2,160	2,317	2,139	2,361
Feed, Seed, Waste		14		14		14
TOTAL Use	2,334	2,315	2,250	2,424	2,224	2,483
Ending Stocks	269	275	234	247	230	208
TOTAL DISTRIBUTION	2,733	2,740	2,606	2,845	2,569	2,776

Source: FAS

Sunflower seed oil

Sunflower seed oil is mainly used in food consumption in the European market. Pure sunflower oil cannot be used as biodiesel because of the CEN standards. However it can be used in a blend. Also the availability and the price of the sunflowerseed oil make it less attractive on the biofuels market.

In France, the market share for sunflower oil in table oils has gradually been declining since 1992, for the benefit of olive oils and blended table oils due to increasing health concerns among consumers.

PALM OIL

EU25 Palm oil (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	01/2004		01/2005		01/2006	
Beginning Stocks	221	163	198	166	200	216
Production		0		0		0
Extra EU25 imports	3,276	3,274	4,100	3,796	4,400	4,050
TOTAL SUPPLY	3,497	3,437	4,298	3,962	4,600	4,266
Extra EU25 exports	83	77	85	85	85	95
Industrial	286	751	495	1,001	550	1,253
Food Use	2,678	2,183	3,263	2,398	3,500	2,481
Feed, Seed, Waste	252	260	255	262	265	266
TOTAL Use	3,216	3,194	4,013	3,661	4,315	4,000
Ending Stocks	198	166	200	216	200	171
TOTAL DISTRIBUTION	3,497	3,437	4,298	3,962	4,600	4,266

Source: FAS

Palm Oil

The use of palm oil is increasing sharply in the European Union. Two palm oil refineries with a capacity of 900,000 MT and 350,000 MT per year are currently being built in the Netherlands (See GAIN NL5017). These refineries are expected to be operational in mid-2005 and December 2005. Another refinery plans to increase its capacity by 200,000 MT in 2006. Therefore the total additional refining capacity will amount to at least 1.45 million MT by the end of 2006. This will lead to a shift in imports with increasing imports of raw palm oil at the expense of refined palm oil.

In the EU the major incentive to use palm oil rather than other oils is its competitive price compared to soybean oil or rapeseed oil. According to FEDIOL, the EU oil and protein meal industry organization, the huge increase in imports of raw palm oil is caused by tax exemptions for the Malaysian companies in the EU. These companies can buy the raw material from Malaysia without export taxes, which gives their palm oil a price advantage of about $60 per ton, compared to other oils in the EU.

Palm oil use is expected to continue to increase sharply in the coming years. The majority of the increase will be for industrial use, mainly combustion, for which some 200,000 MT of palm oil are already used in the Netherlands. Some palm oil will reportedly be used for biodiesel production in the Netherlands, but not in Germany or France. The use of palm oil for biodiesel is limited because of difficulties in complying with the EU biodiesel standard EN 14214. The increase in food use is less pronounced than for industrial use and also entirely price driven.

The top 5 users of palm oil in the EU-25 are the Benelux, the U.K., Germany, Italy and France.

OLIVE OIL

EU25 Olive Oil (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	11/2003		11/2004		11/2005	
Trees		8,896		7,172		7,174
Beginning Stocks	534	568	793	917	675	846
Production	2,298	2,481	1,999	2,064	2,300	1,952
Extra EU25 imports	238	238	170	202	100	223
TOTAL SUPPLY	3,070	3,287	2,962	3,183	3,075	3,021
Extra EU25 exports	356	397	360	350	400	341
Industrial	37	54	37	54	38	54
Food Use	1,884	1,879	1,890	1,883	1,900	1,959
Feed, Seed, Waste		40		50		68
TOTAL Use	1,921	1,973	1,927	1,987	1,938	2,081
Ending Stocks	793	917	675	846	737	766
TOTAL DISTRIBUTION	3,070	3,287	2,962	3,183	3,075	3,021

Source: FAS

Olive Oil

The CAP reform of the olive sector will tend to lead to an overall activity reduction in the long run, due to the abandon of less competitive producers. The sector is also anticipated to re-structure, and focus efforts upon production of high quality, bottled product. As it becomes more market-oriented, the sector will also tend to move towards greater self-sufficiency, and less dependence on public funding.

Olive oil production in Spain, Portugal and Italy is expected to decline in MY 2005/06, due to the effects of the drought in Spain and Portugal and because of the normal tree alternation between off and on years. In Greece the blooming stage is promising a production of about 440,000 MT, which is 20,000 MT more that what is eligible for EU support and subsidies.

Olive oil consumption in Spain and Portugal is expected to continue to have an upward trend in MY 2005/06, due to continuing marketing efforts by the industry. Whereas in Italy the consumption growth is limited and stagnant.

Olive oil exports will tend to be down in MY 2005/06, as a result of the short crop. In addition to the reduction on supply, prices will tend to remain high, affecting the competitiveness of Spanish olive oil abroad. In third-country markets, Spanish olive oil is further affected by the appreciation of the Euro against the dollar.

COTTON COMPLEX

EU25 Cotton seed (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	10/2003		10/2004		10/2005	
Area (1000 ha)	460	463	470	470	455	443
Beginning Stocks	12	35	10	12	27	15
Production	597	667	750	781	690	707
Extra EU25 imports	215	199	180	106	180	102
TOTAL SUPPLY	**824**	**901**	**940**	**899**	**897**	**824**
Extra EU25 exports	23	23	25	25	25	25
Crush	460	532	549	520	524	460
Food Use		0		0		0
Feed, Seed, Waste	331	334	339	339	326	329
TOTAL Use	791	866	888	859	850	789
Ending Stocks	10	12	27	15	22	10
TOTAL DISTRIBUTION	**824**	**901**	**940**	**899**	**897**	**824**

Source: FAS

Cotton seed

In the European Union only three Member states produce cotton at a commercial level. These MS are Greece, Spain and Portugal.

Extensive changes have been made to the aid arrangements for cotton in the European Union, with part of the Community aid paid to ginners being converted into a single farm payment. In order to safeguard production in certain areas, area aid will continue to make up 35 percent of total aid.

These new aid arrangements will apply from January 1, 2006. In the new arrangements for cotton there will be a partial move to a system of decoupling and single farm payments. The move is only partial in that 35 percent of the aid will continue to be provided in the form of an area payment, as direct aid. The remaining 65 percent will be provided as a single farm payment. Under previous arrangements the growers did not benefit from direct aid for cotton but rather from the indirect aid paid to ginners. During the reference period 2000 to 2002, no direct producer aid for cotton existed in the EU.

According to a report made by ODI[1] the EU subsidies to cotton may be more damaging to developing countries and to West and Central Africa in particular, than their share in total export subsidies would suggest because cotton production in Greece and Spain actively competes with cotton production from developing countries in third markets and the subsidies Greek and Spanish farmers receive per unit of cotton production is the highest in the world.

[1] *ODI, Overseas Development Institute is a UK based independent think-tank on international development and humanitarian issues.* http://www.odi.org.uk/

The Spanish cotton production is forecast to decrease moderately in MY 2005/06 in association with a lower local cotton crop. The Spanish seed crushings are also anticipated to decline as cotton oil continues to be replaced by other oils. Due to the lower crushings, the availability of cotton meal will decline, as will feed consumption. In Spain the cotton meal feed consumption is closely related to the compound feed production for dairy cattle.

In Greece there was an increased cottonseed production in 2004. Due to a drop of acreage planted with cotton in 2005, caused by the Greece Ministry of agriculture wanting the output to stay within the quota, there will be a decrease in production in 2005. In Greece the cottonseed industry is directly connected to a well developed poultry, swine and fish farming sector.

EU25 Cotton meal (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	10/2003		10/2004		10/2005	
Crush	460	532	549	520	524	460
Extraction Rate	0.4413	0.4492	0.4408	0.4462	0.4427	0.4478
Beginning Stocks	26	6	13	4	9	7
Production	203	239	242	232	232	206
Extra EU25 imports	112	87	88	51	75	56
TOTAL SUPPLY	341	332	343	287	316	269
Extra EU25 exports		2		3		4
Industrial		0		0		0
Food Use		0		0		0
Feed, Seed, Waste	328	326	334	277	307	260
TOTAL Use	328	326	334	277	307	260
Ending Stocks	13	4	9	7	9	5
TOTAL DISTRIBUTION	341	332	343	287	316	269

Source: FAS

EU25 Cotton oil (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	10/2003		10/2004		10/2005	
Crush	460	532	549	520	524	460
Extraction Rate	0.1565	0.1541	0.1566	0.1538	0.1565	0.1543
Beginning Stocks	4	2	2	3	4	6
Production	72	82	86	80	82	71
Extra EU25 imports	4	2	2	2	2	2
TOTAL SUPPLY	**80**	**86**	**90**	**85**	**88**	**79**
Extra EU25 exports	7	6	7	6	7	7
Industrial						
Food Use	71	75	79	71	77	66
Feed, Seed, Waste		2		2		2
TOTAL Use	71	77	79	73	77	68
Ending Stocks	2	3	4	6	4	4
TOTAL DISTRIBUTION	**80**	**86**	**90**	**85**	**88**	**79**

Source: FAS

FISHMEAL

EU25 Fishmeal (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	01/2003		01/2004		01/2005	
Catch for reduction	1,610	1,245	1,600	1,210	1,600	1,210
Extraction Rate	0.3124	0.3253	0.3125	0.3603	0.3125	0.3603
Beginning Stocks	35	0	20	0	20	0
Production	503	405	500	436	500	436
Extra EU25 imports	587	564	580	588	600	583
TOTAL SUPPLY	1,125	969	1,100	1,024	1,120	1,019
Extra EU25 exports	197	195	200	179	200	179
Industrial		0		0		0
Food Use		7		7		7
Feed, Seed, Waste	908	767	880	838	900	833
TOTAL Use	908	774	880	845	900	840
Ending Stocks	20	0	20	0	20	0
TOTAL DISTRIBUTION	1,125	969	1,100	1,024	1,120	1,019

The extraction rate might be misleading since some MS have production but no catch for reduction.

Source: FAS

Fishmeal

The use of fishmeal in the European Union has been directly or indirectly influenced by policies such as measures regarding BSE and dioxin. In lesser extent the use is related to the price of soybean meal. Denmark is the most important Member State and accounts for about 60 percent of the EU fishmeal production, mainly produced from tobis. The domestic consumption in Denmark is mainly mink feed, but exporters are trading fishmeal all over the world. Fishmeal use has been minimilized during the past four years to the use of low levels in piglet feeds and to some extent broiler feeds because fishmeal is seen as an ingredient with a lot of minor but important elements not present in vegetable ingredients. Fishmeal is still used in high levels in fish feed.

In the European Union fishmeal cannot be fed to ruminants, not because there is anything wrong with the fishmeal, but because the Commission fears it could be accidentally or deliberately adulterated with meat and bone meal (MBM).

The fishmeal ban was introduced in January 2001 as part of the BSE control measures and had to be reviewed by June 30, 2003. The Parliament and Council adopted (17 June 2003) a proposal for a Regulation, which prolongs the transitional measures, for a group of temporary TSE feed controls into a permanent TSE Regulation (99/2001) for a further two years until 30 June 2005. The current provisions of the feed ban are included under the same Regulation without a fixed time schedule. This applied from 1 September 2003.

The Commission has indicated that it will lift the ban on fishmeal when there is a reliable test to distinguish MBM contamination in fishmeal. The Commission has proposed that the ban on fishmeal in feed for ruminants should be abandoned and a decision is expected on June 30 this year.

PALM KERNEL, PEANUTS AND COPRA

Palm Kernel, Peanut and Copra are not produced in the European Union and are purely trade and price affected.

PALM KERNEL COMPLEX

EU25 Palm Kernel (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	01/2003		01/2004		01/2005	
Area (1000 ha)		0		0		0
Beginning Stocks		0		0		0
Production		0		0		0
Extra EU25 imports	53	56	50	52	50	52
TOTAL SUPPLY	53	56	50	52	50	52
Extra EU25 exports		0		0		0
Crush	53	56	50	52	50	52
Food Use		0		0		0
Feed, Seed, Waste		0		0		0
TOTAL Use	53	56	50	52	50	52
Ending Stocks		0		0		0
TOTAL DISTRIBUTION	53	56	50	52	50	52

EU25 Palm Kernel Meal (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	01/2003		01/2004		01/2005	
Crush	53	56	50	52	50	52
Extraction Rate	0.5472	0.3214	0.5600	0.3462	0.5600	0.3462
Beginning Stocks	0	0		0		0
Production	29	18	28	18	28	18
Extra EU25 imports	2,577	2,457	2,675	2,705	2,775	2,807
TOTAL SUPPLY	2,606	2,475	2,703	2,723	2,803	2,825
Extra EU25 exports		0		0		0
Industrial		0		0		0
Food Use		0		0		0
Feed, Seed, Waste	2,606	2,475	2,703	2,723	2,803	2,825
TOTAL Use	2,606	2,475	2,703	2,723	2,803	2,825
Ending Stocks		0		0		0
TOTAL DISTRIBUTION	2,606	2,475	2,703	2,723	2,803	2,825

EU25 Palm Kernel Oil (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	01/2003		01/2004		01/2005	
Crush	53	56	50	52	50	52
Extraction Rate	0.4151	0.3214	0.4200	0.3462	0.4200	0.3462
Beginning Stocks	47	49	47	49	46	45
Production	22	18	21	18	21	18
Extra EU25 imports	622	638	630	652	644	664
TOTAL SUPPLY	691	705	698	719	711	727
Extra EU25 exports	1	1	1	1	1	1
Industrial	105	113	110	116	113	120
Food Use	522	527	525	542	532	551
Feed, Seed, Waste	16	15	16	15	17	15
TOTAL Use	643	655	651	673	662	686
Ending Stocks	47	49	46	45	48	40
TOTAL DISTRIBUTION	691	705	698	719	711	727

COPRA COMPLEX

EU25 Copra (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	01/2003		01/2004		01/2005	
Area (100 ha)		0		0		0
Beginning Stocks	3	3	3	3	3	3
Production		0		0		0
Extra EU25 imports	42	72	30	67	30	67
TOTAL SUPPLY	45	75	33	70	33	70
Extra EU25 exports		0		0		0
Crush	42	39	30	40	30	40
Food Use		33		27		27
Feed, Seed, Waste		0		0		0
TOTAL Use	42	72	30	67	30	67
Ending Stocks	3	3	3	3	3	3
TOTAL DISTRIBUTION	45	75	33	70	33	70

EU25 Copra Meal (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	01/2003		01/2004		01/2005	
Crush	42	39	30	40	30	40
Extraction Rate	0.3333	0.3333	0.3333	0.3250	0.3333	0.3250
Beginning Stocks		0		0		0
Production	14	13	10	13	10	13
Extra EU25 imports	138	135	130	139	130	139
TOTAL SUPPLY	152	148	140	152	140	152
Extra EU25 exports		0		0		0
Industrial		0		0		0
Food Use		0		0		0
Feed, Seed, Waste	152	148	140	152	140	152
TOTAL Use	152	148	140	152	140	152
Ending Stocks		0		0		0
TOTAL DISTRIBUTION	152	148	140	152	140	152

EU25 Coconut Oil (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	01/2003		01/2004		01/2005	
Crush	23	39	42	40	45	40
Extraction Rate	0.5652	0.6667	0.5476	0.6750	0.5556	0.6750
Beginning Stocks	69	103	43	45	32	34
Production	13	26	23	27	25	27
Extra EU25 imports	698	666	725	684	725	677
TOTAL SUPPLY	780	795	791	756	782	738
Extra EU25 exports	37	35	35	35	35	35
Industrial	250	228	250	208	250	201
Food Use	430	441	454	438	452	439
Feed, Seed, Waste	20	46	20	41	20	36
TOTAL Use	700	715	724	687	722	676
Ending Stocks	43	45	32	34	25	27
TOTAL DISTRIBUTION	780	795	791	756	782	738

PEANUT COMPLEX

EU25 Peanuts (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	10/2003		10/2004		10/2005	
Area (1000 ha)		0		0		0
Beginning Stocks	9	8	3	18	13	13
Production		0		0		0
Extra EU25 imports	641	446	725	448	765	453
TOTAL SUPPLY	650	454	728	466	778	466
Extra EU25 exports	16	4	16	4	15	4
Crush	30	10	40	10	50	10
Food Use	598	417	656	434	700	434
Feed, Seed, Waste	3	5	3	5	3	5
TOTAL Use	631	432	699	449	753	449
Ending Stocks	3	18	13	13	10	13
TOTAL DISTRIBUTION	650	454	728	466	778	466

Peanut Meal (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	10/2003		10/2004		10/2005	
Crush	30	10	40	10	50	10
Extraction Rate	0.4333	0.8000	0.4250	0.8000	0.4400	0.8000
Beginning Stocks		3		0		0
Production	13	8	17	8	22	8
Extra EU25 imports	30	24	29	27	28	27
TOTAL SUPPLY	43	35	46	35	50	35
Extra EU25 exports		0		0		0
Industrial		0		0		0
Food Use		0		0		0
Feed, Seed, Waste	43	35	46	35	50	35
TOTAL Use	43	35	46	35	50	35
Ending Stocks		0		0		0
TOTAL DISTRIBUTION	43	35	46	35	50	35

EU25 Peanut oil (1000 MT)						
	2003/04		2004/05		2005/06	
	USDA Official	Posts estimates	USDA Official	Posts estimates	USDA Official	Posts estimates
Calendar Year Begin	10/2003		10/2004		10/2005	
Crush	30	10	40	10	50	10
Extraction Rate	0.3667	0.2000	0.3500	0.2000	0.3600	0.2000
Beginning Stocks	14	11	9	5	7	4
Production	11	2	14	2	18	2
Extra EU25 imports	131	97	136	102	145	102
TOTAL SUPPLY	156	110	159	109	170	108
Extra EU25 exports	11	9	4	3	5	3
Industrial		0		0		0
Food Use	136	93	148	94	160	94
Feed, Seed, Waste		3		8		8
TOTAL Use	136	96	148	102	160	102
Ending Stocks	9	5	7	4	5	3
TOTAL DISTRIBUTION	156	110	159	109	170	108

BIODIESEL

The European Commission has set as a goal that by the end of 2005, 2 percent of the energy used in transportation shall be biofuels. The use of biofuels is then to grow by 0.75 percent annually. The ambition is to have 5.75 percent biofuels in transportation by 2010. The actual share of biofuels in European consumption today is estimated to be 1 percent. These goals are part of the main energy policy target of the EU which is to double the share of Renewable Energy Sources (RES) in gross inland consumption from 5.4 percent in 1997 to 12.0 percent by 2010.

In Europe the most important biofuel is biodiesel. Biodiesel accounts for about 80 percent of the biofuels used for transportation. Unlike the US where the biodiesel is produced from soybean oil, the European Union uses mainly rapeseed oil, and to some extent sunflower oil to produce its biodiesel. Biodiesel production uses around 1.4 million hectares of arable land in the European Union.

The European Commission has published a guideline in compliance with the "Comité Européen de Normalisation" CEN Standardization (EN 14214) in order to insure quality and performance for biodiesel. The guidelines in this publication make it more difficult to use 100 percent soybean oil as a base for the biodiesel in Europe. In Spain's decree[2] for renewable fuels the iodine index was put at 140, which would allow soyoil for biodiesel. This standardization was according to the European Commission not set to exclude some oils from the biodiesel market. To reach the demands for biodiesel, the standard is likely to be discussed relatively soon.

[2] *Decree 1700/2003, Article 7, paragraph 3*

Iodine numbers for some vegetable oils

	Iodine Number (g/100g)	Melting Point (°C)
Soybean oil	125-140	–12
Sunflower oil	125-135	-18
Rapeseed oil	97-115	5
Palm oil	44-58	30-38

Source: FAS the Hague

The iodine number is an indication of the content of unsaturated fatty acids. Due to the low content of unsaturated fatty acids, and low iodine number, palm oil has a high melting point, which makes it unusable for the climate in Europe.

In the New Member States only the Czech Republic has an important production of biodiesel. Poland and Hungary also have some production, however it is still insignificant, and not yet on a commercial level.

Biodiesel Production '000 tons

Country	2002	2003	2004*	2006**
Germany	450	715	1,088	1,900-2,100
France	366	357	502	600-800
Italy	210	273	419	500-550
Austria	25	32	100	150
Spain	n/a	9	70	70-80
Denmark	10	41	44	30-40
United Kingdom	3	9	15	250
Sweden	1	1	8	8-10
Czech Republic	68.8	70	47	60-70
Poland	0	0	1.2	100-120
Hungary	0	0	2	n/a

*Source: European Biodiesel Board, FAS Budapest, FAS Warsaw FAS Madrid and FAS Prague. *Estimates*
***FEDIOL estimates*

The directive on the taxation of energy products gives the MS a legal framework to differentiate taxation between biofuels and conventional fuels. Given that biofuel production costs are currently at least twice those of conventional fuels, it is essential to provide some kind of financial aid for the biofuel production to make it competitive. Reducing the tax burden on producers would also be a means to encourage investments as well as consumer take-up.

Summary of Member State tax breaks for Biofuel production	
Austria	Full exemption of €310/m³, for pure biodiesel and blends up to 2 percent.
Belgium	Discussions to introduce full exemption underway.
Denmark	No measures currently in place.
Finland	No measures currently in place.
France	In 2004, for biodiesel in diesel, partial exemption of €0,33 per liter, for a quota of 467,500 MT. For bioethanol in gasoline, partial exemption of €0,38 per liter for 100,000 MT.
Germany	Total tax exemption of €0.47/liter, until at least 2009.
Greece	No measures currently in place.
Ireland	No measures currently in place.
Italy	Full exemption of €403m³ up to a quota of 300,000t. Pure biodiesel used for heating (rather than transport) can avail of measure.
The Netherlands	Discussions to introduce full exemption underway.
Portugal	Discussions underway on incentives to introduce.
Poland	Full exemption and defined mandatory targets for biofuel market penetration.
Spain	Full exemption for biofuels.
Sweden	Full exemption of €365/m³, until at least 2008.
U.K.	Exemption of £0.20 per liter on bioethanol and biodiesel.

Sources: Agra Focus and FAS Dublin, FAS Paris, FAS Berlin

CARBON CREDITS

The CAP Reform of 2003 introduced the so-called Carbon Credit, which grants a payment of €45/ha to growers of energy crops, including crops grown for the production of biodiesel and bioethanol. Carbon credit is available for all agricultural crops except sugarbeets and hemp, as long as they are used for approved energy uses, and have a contract for this. EU farmers cannot get carbon credit for energy crops on set-aside land.

It is not yet clear how much take up there will be of this program. Provisional data for 2004, the first year that it was implemented suggest that around 300,000 hectares of carbon credits were claimed, the vast majority of this area planted to rapeseed. The main users have been France (125,000 ha), Germany and the UK. The maximum acreage is 1.5 million hectares.

The €45/ha subsidy, due to its low level, is expected to have little impact in the short run on EU production of energy crops. However, a close watch on this policy should be maintained, as not only is it related to the issue of EU oilseeds and Blair House, but also the Commission could conceivably raise the amount of area to be subsidized in the future.

BLAIR HOUSE AGREEMENT

The 1992 Blair House Agreement (BHA) between the US and the EU was an important element of the final Uruguay Round Agreement for Agriculture. BHA resolved a US-EU dispute over EU domestic support that impaired access to the EU oilseed market.
The BHA limits the EU production of oilseeds. BHA restricts the maximum EU oilseed area for food use to 4.9338 million ha, and the annual output of oilmeal from oilseeds planted on set-aside land for industrial use to 1 million MT of soybean meal equivalent.

The by-product limit has not been adjusted to account for the 2004 enlargement of the EU. However, enlargement is not expected to greatly increase the set-aside acreage devoted to

industrial oilseeds in the short term due to the fact that in eight out of ten of the new member states, farmers will not have a set-aside obligation.

Starting with the 02/03 marketing year, the EU has maintained that they are no longer bound by the Blair House agreement obligations with regard to acreage limits for oilseeds on non-set-aside land. Consequently, for the MY 2002/03 and MY 2003/04 crops years, the EU has not provided data showing compliance with the acreage limitations.

BIOTECH AND LABELING

The debate concerning biotechnology in the EU is highly politicized. Many of the contentious biotech issues now confronting the EU are not related to human health and environmental safety. Over the last 6 years the EU has implemented a comprehensive regulatory system to ensure that biotech products are fully evaluated to ensure their safety.

The EU and the member states are now deadlocked over a number of issues that are based on economic considerations, and not safety:
1) the on-going search for seed labeling legislation for biotech events approved by EFSA and
2) the development of coexistence measures for biotech, conventional and organic agriculture that equally protect the interests of all farmers; and
3) the lifting of the marketing bans in 6 member states.

In general, all food and feed products in the European Union containing or consisting of GMOs and/or produced from GMOs, including products that no longer contain detectable traces of GMOs must be labeled. The allowable adventitious presence level for EU-approved varieties of GMOs for use in food and feed is set at 0.9 percent. Above this level, all products must be labeled. For GM varieties, which are not yet formally approved but which have received a positive EU risk assessment, the adventitious presence level is set 0.5 percent. This provision will expire after 3 years. Above this threshold, the product is not allowed on the EU market. Operators must demonstrate that the presence of GM material was adventitious or technically unavoidable.

The regulation does not require labeling of products that are not food ingredients, such as processing aids. Meat, milk or eggs obtained from animals fed with GM feed or treated with GM medicinal products do not require GM labeling. (For more information on Biotech issues in the EU see GAIN report E35091)

Visit our website: our website **www.useu.be/agri/usda.html** provides a broad range of useful information on EU import rules and food laws and allows easy access to USEU reports, trade information and other practical information.
E-mail: AgUSEUBrussels@usda.gov

Related reports from USEU Brussels:

Report Number	Title	Date Released
E35101	Conditions for importing biodiesel to the EU	05/31/05
E35085	Strong Growth anticipated for EU Biodiesel Production	05/03/05
E35058	Biofuels situation in the European Union	03/23/05
E35091	Annual Biotech report	05/13/05
These reports can be accessed through our website www.useu.be/agri or through the FAS website http://www.fas.usda.gov/scriptsw/attacherep/default.asp.		

Germany

Report Number	Title	Date Released
GM 4030	Crop estimate for rapeseed	08/30/04
GM4038	Estimate for German rapeseed crop raised again	10/04/04
GM4046	First projection of winter rapeseed area for harvest in 2005	11/18/04
GM4048	Biofuels in Germany - Prospects and limitations	11/22/04

France

Report Number	Title	Date Released
FR4067	Rapeseed Crush Significantly up in 2004/05	11/30/04
FR5002	New incentives for Biofuel production	01/10/05
FR5018	Biodiesel demand boosts rapeseed production	03/07/05
FR5030	Primary Conclusion of French Parliamentary Working Group on Biotech	04/18/05
FR5037	ASA Delegation Meets with French Industry on T&L	06/06/05
FR5041	Biotech Test Plots in Danger – U.S. companies getting ready	06/14/05

Italy

Report Number	Title	Date Released
IT5010	Biodiesel Fuel/Bioethanol Production Prospects in Italy Update	03/25/05

The Netherlands

Report Number	Title	Date Released
NL5017	Dutch Palm Oil Imports Are Expected To Surge	06/08/05

New Member States

Report Number	Title	Date Released
PL3049	Poland approves biofuel law	12/12/03
HU5001	Biofuels in Hungary	01/20/05
CZ5004	Biofuels in the Czech Republic	02/15/05